



Santa Cruz County Phone Customer Service Center Overview

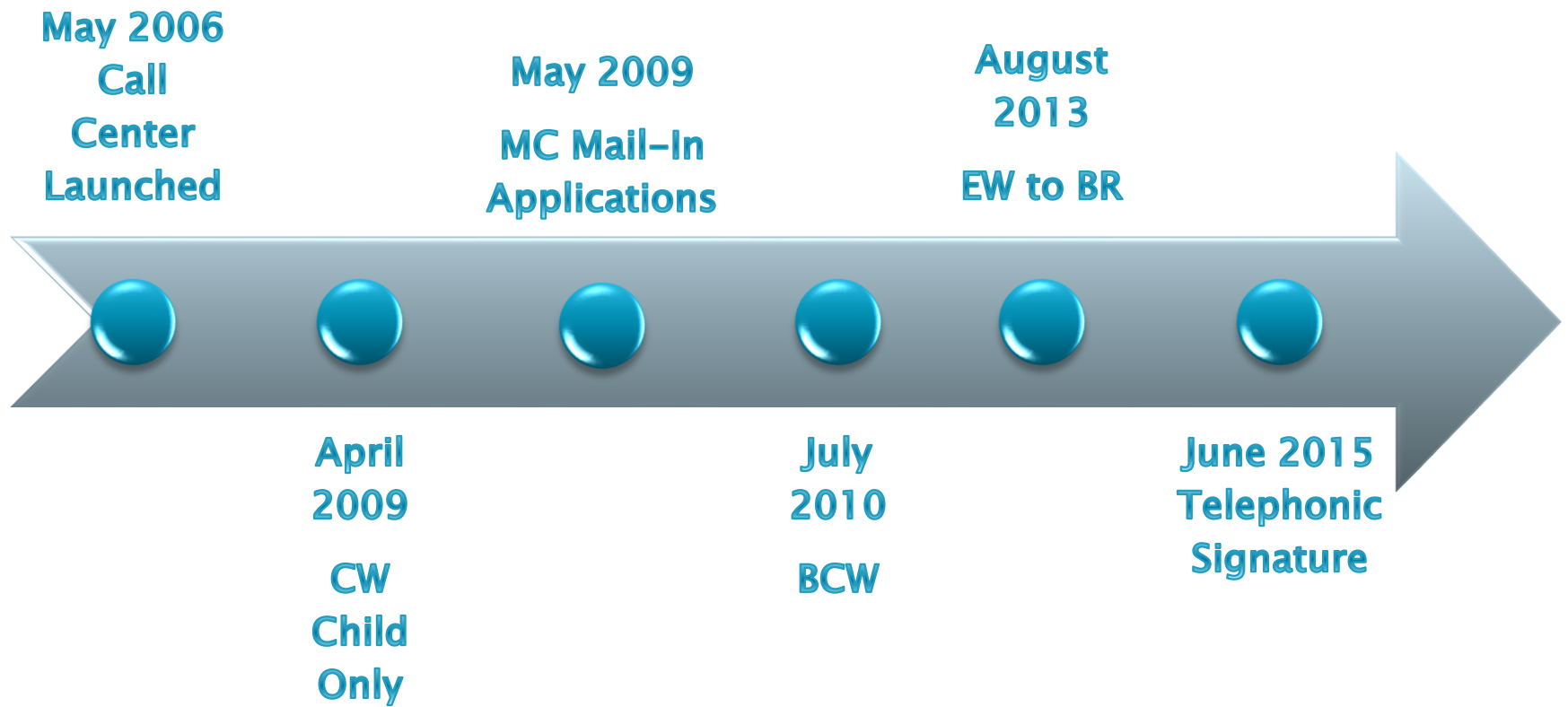
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County of Santa Cruz
Human Services Department
Employment & Benefit Services Division

Outline

- ▶ Timeline of Phone Customer Service Center
- ▶ Rotating Functional Assignment (RFA)
- ▶ Telephonic Signature
- ▶ Lessons Learned

Timeline



RFA Overview

- ▶ Defines assignments based on priorities and compliance requirements
- ▶ In addition to general customer service responsibilities, each team receives specific tasks or assignments
- ▶ Assignments are prioritized by regulatory time frames
- ▶ Assignments allow for cross-training in all forms of customer access channels

Task Priorities

The overall task priorities for the Department are:

Priority	Task Type	SubType / Program	Compliance/ Processing Requirements	Processing Center	
				Walk Ins	Phones
1	Applications	CalWorks – Immediate Need	1 business day	Yes	No
		CalFresh – Expedited Service	3 calendar days	Yes	Yes
		General Assistance	45 days	Yes	Yes
		CalWorks – Regular Application	45 calendar days	Yes	No
		CalFresh – Regular Application	30 calendar days	Yes	Yes
		MediCal	45 days of receipt	Yes	Yes
2	Periodic Reports		1 st 2 weeks of month, heaviest 2 nd week	Yes	Yes
3	RRR's		1 st 3 weeks of month, prior to NOA cutoff	Yes	Yes
4	Pending Assignments	All Tasks		Yes	Yes
		CW61		Yes	No
5	Special Reports		Priorities may escalate, depending on report	Yes	Yes
6	Other County or interoffice referrals			Yes	Yes

General task assignment philosophy:

- Cash assistance and need are highest priority
- If assigned a priority task, the BR is to review and process all related case tasks that can be processed at that time.

Sample of Team Rotation

Option 2.7 - Minnie and Leti's Team Combined with schedule redistribution for balance

	W CF	W CF	W CF	FR CF	FR CF	FR CF	TU CF	TU CF	TU CF	TH CF	TH CF	TH CF		TH CF
	Group A Mondays AHOD, Tuesday and Thursday ☹️, Wednesday and Friday ☹️ Unless Assigned to CF RC's, QS / APPs, or Seasonal / APPs						Group B Mondays AHOD, Tuesday and Thursday ☹️, Wednesday and Friday ☹️ Unless Assigned to CF RC's, QS / APPs, or Seasonal / APPs							Team 9/80 Mondays AHOD, Tuesdays & Thursdays Primary ☹️ Wednesdays & Fridays Primary ☹️ Unless Assigned to CF RC's, QS / APPs, or Seasonal / APPs
17-Apr	Leticia PA 8	Rocio O 8	Raunel Z 9	Yvonne C 9	Gricelda V QS / Seasonal		Minnie R Priority Misc #Floater	Rosa C 9	Angelica O 8	Alfredo R 9	Silvia F 9	Alma 8	17-Apr	
17-May	BC20 Minnie R 5	BR10 Rosa C 9	BR20 Angelica O QS / Seasonal	BR30 Alfredo R 7	BR40 Silvia F 9	BR90 Alma R 4	BC20 Leticia PA 8	BR50 Rocio O Priority Misc #Floater	BR60 Raunel Z 9	BR70 Yvonne C 7	BR80 Gricelda V 9		#####	Team 9/80 8
17-Jun	BC20 Leticia Minnie 11	BR50 Rocio O 7	BR60 Raunel Z 8	BR70 Yvonne C QS / Seasonal	BR80 Gricelda V 8	Minnie & Teams are combined	BR10 Rosa C 8	BR20 Angelica O 7	BR30 Alfredo R 8	BR40 Silvia F 8	BR90 Alma R Priority Misc #Floater		17-Jun	Team 9/80 9
* 17-Jul	BR10 Rosa C Priority Misc #Floater	BR20 Angelica O 7	BR30 Alfredo R 8	BR40 Silvia F 8	BR90 Alma R 7	1040 isn't Floater ↔	BC20 Leticia Minnie QS / Seasonal	BR50 Rocio O 7	BR60 Raunel Z 8	BR70 Yvonne C 8	BR80 Gricelda V 8		17-Jul	Team 9/80 11
17-Aug	BC20 Leticia Minnie 11	BR50 Rocio O 7	BR60 Raunel Z QS / Seasonal	BR70 Yvonne C 8	BR80 Gricelda V 8		BR10 Rosa C 8	BR20 Angelica O 7	BR30 Alfredo R Priority Misc #Floater	BR40 Silvia F 8	BR90 Alma R 7		17-Aug	Team 9/80 10
17-Sep	BR10 Rosa C 8	BR20 Angelica O 7	BR30 Alfredo R 8	BR40 Silvia F QS / Seasonal	BR90 Alma R - 8 7		BC20 Leticia Minnie 11	BR50 Rocio O 7	BR60 Raunel Z 8	BR70 Yvonne C 8	BR80 Gricelda V Priority Misc #Floater		17-Sep	Team 9/80 10
17-Oct	BC20 Leticia Minnie 11	BR50 Rocio O QS / Seasonal	BR60 Raunel Z 8	BR70 Yvonne C 8	BR80 Gricelda V 8		BR10 Rosa C 8	BR20 Angelica O Priority Misc #Floater	BR30 Alfredo R 8	BR40 Silvia F 8	BR90 Alma R 7		17-Oct	Team 9/80 8
* 17-Nov	BR10 Rosa C 8	BR20 Angelica O 7	BR30 Alfredo R 8	BR40 Silvia F 8	BR90 Alma R QS / Seasonal		BC20 Leticia Minnie 11	BR50 Rocio O 7	BR60 Raunel Z 8	BR70 Yvonne C Priority Misc #Floater*	BR80 Gricelda V 8		17-Nov	9
17-Dec	BC20 Leticia Minnie QS / Seasonal	BR50 Rocio O 7	BR60 Raunel Z 8	BR70 Yvonne C 8	BR80 Gricelda V 8		BR10 Rosa C Priority Misc #Floater	BR20 Angelica O 7	BR30 Alfredo R 8	BR40 Silvia F 8	BR90 Alma R - 4 7		17-Dec	11

RFA Goals

- ▶ **Full Service perspective**
- ▶ **Focus on priorities, compliance and team work**
- ▶ **Predictable and measureable workload**
- ▶ **Simplified business practices**
- ▶ **Versatile, knowledgeable staff through cross training**
- ▶ **Environment flexible to change**

Telephonic Signature for CalFresh

- ▶ Discovered web-based solution that was functional regardless of phone system
- ▶ Minimal & affordable hardware requirements
- ▶ Very affordable development and operating costs
- ▶ Policy approach to Telephonic Signature.....
Mimic the simplest form of application from My Benefits CalWIN (SAWS 1).

Telephonic Signature for CalFresh

- ▶ June 2015 – Full implementation of Telephonic Signature for intake and ongoing
- ▶ September 2015– Developed dedicated recertification tool
- ▶ November 2016 – Implemented Telephonic Signature for Affidavits
- ▶ May/ June 2017 – Testing SAR 7 Telephonic Signature
- ▶ August 2017– Go Live SAR 7 Telephonic Signature

Lessons Learned

- ▶ **Bring in staff early in the decision making process, solicit ideas from staff; analyze viability of suggestions.**
- ▶ **Test new technology with one or two units before implementing.**
- ▶ **Cross train staff to process all tasks to allow flexibility in assigning.**
- ▶ **During induction training incorporating the intake component so BR's are able to come out on the floor able to process ongoing and intake.**

Questions?

